



COMMONWEALTH of VIRGINIA

Department for the Aging

Jay W. DeBoer, J.D., Commissioner

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COMMONWEALTH of VIRGINIA
Department for the Aging
Jay W. DeBoer, J.D., Commissioner

MEMORANDUM

TO: Executive Directors
Area Agencies on Aging

FROM: Bill Peterson
Deputy Commissioner

DATE: February 8, 2005

SUBJECT: Share Your News

At VDA, we want to know about what's happening in the aging network here in Virginia. We appreciate hearing about awards, grants, and other recognition that your agency, employees or programs receive. This information helps when we are contacted by other agencies with partnership opportunities and AAAs requesting technical assistance. Please remember to keep us informed!

Thanks!

COMMONWEALTH of VIRGINIA
Department for the Aging
Jay W. DeBoer, J.D., Commissioner

MEMORANDUM

TO: Executive Directors
Area Agencies on Aging

AND: Nutrition Directors

FROM: Carol Cooper Driskill
Program Coordinator

DATE: February 8, 2005

SUBJECT: 2005 Group Educational Survey

I would like to assess the educational preferences of older adults who attend congregate nutrition sites and senior centers.

I would appreciate if the Site Managers could administer the attached survey to participants. My recommendation is to question the entire group and document the number of responses and suggestions. Add extra paper as needed. Please encourage the Site Managers to separately add their own suggestions and comments. Please feel free to administer the survey in a different way if you think that is preferable.

Please contact me with any questions at (804) 662-9319 or Carol.Driskill@vda.virginia.gov. I would like the surveys returned to me by April 29, 2005.

Virginia Department for the Aging
2005 Group Education Survey: Interest Areas & Methods of Learning

Please administer this survey to your congregate nutrition site or senior center as a group. Thank you!

Area Agency on Aging _____ Site Name _____

Site Manager _____ Date _____ No. of Seniors Present _____

Preferred Methods of Learning

Question: How do you prefer to receive educational information? You can pick more than one.

Site Manager – Count number of people for each method.

- | | |
|--|---|
| _____ Group discussion | _____ Site Manager as speaker |
| _____ Guest speaker | _____ Speaker and handout |
| _____ Demonstration by speaker | _____ Hands on activity where I can participate |
| _____ Educational handout only | _____ Quiz, puzzle, word search |
| _____ Video or movie | _____ Education incorporated into a game or bingo |
| _____ I like information that I can take home with me for future reference | |
| _____ I don't like any of these | _____ I don't know |
| _____ Other: _____ | |

Interest Areas

We provide information on nutrition, food, fruits and vegetables, food safety, preventing disease, promoting health, etc.

Question: What subjects do you want to learn more about? Are there other topics that you want to learn about? What topics do you dislike? Do you have other comments or suggestions?

Site Manager – Please list responses and note the number of people for each response.

COMMONWEALTH of VIRGINIA
Department for the Aging
Jay W. DeBoer, J.D., Commissioner

MEMORANDUM

TO: Executive Directors
Area Agencies on Aging

AND: Nutrition Directors

FROM: Carol Cooper Driskill

DATE: February 8, 2005

**SUBJECT: SERVICE STANDARD REMINDER/TECHNICAL ASSISTANCE
FIRE & HEALTH INSPECTIONS AT CONGREGATE NUTRITION SITES**

VDA Congregate Nutrition Service Standard:

Fire Safety – page 4: *Fire drills shall be conducted at least quarterly, in accordance with local fire marshal recommendations; documentation is required. During the fire drill, fire exit routes shall be designated and reviewed. Staff shall be knowledgeable about the location and operation of all fire extinguishers at the site.*

Although not required by the service standard, I encourage you to contact your local fire marshal to request a walk through of the nutrition site when the locality does not require a fire inspection. I personally would be concerned if a community site, such as a church, does not want the fire department in the facility because it could result in corrective action and mandatory repairs.

I suggest contacting the local fire department about conducting a fire drill at the site. It not only benefits the participants and site manager, but helps the fire department learn more about the facility and what they might encounter during a real emergency.

In addition, some fire departments will provide fire safety training to participants and staff. I've experienced hands-on fire extinguisher training where each employee or volunteer extinguishes the fire in a container.

Food Service Operation – page 7: If applicable, the current food permit and/or inspection report, issued by the Health Department shall be posted or be on file. When the local Health Department is able to comply, inspection of the meal site by the local Environmental Health Specialist is recommended, but not required. The Nutrition Director shall maintain copies of all current inspection reports according to AAA record retention policy, but not less than one year.

As written above, we recommend contacting the local health department about visiting congregate nutrition sites because it can result in helpful tips and provide a “stamp of approval.” I know that some local health department will not visit or inspect the site when food is catered. However, local health departments in other parts of the state will visit the site even if food is not prepared there. Depending on the department, there may be a fee for each site, although some health departments exempt the AAA.

Please contact me at (804) 662-9319 or Carol.Driskill@vda.virginia.gov with any questions.

COMMONWEALTH of VIRGINIA
Department for the Aging
Jay W. DeBoer, J.D., Commissioner

February 8, 2005

MEMORANDUM

TO: Executive Directors
Area Agencies on Aging

FROM: Tim M. Catherman
Deputy Commissioner, Support Services

RE: Intrastate Funding Formula

Last week VDA distributed an Excel Workbook with the updated 2000 census information. Since then there have been requests for clarification of the intrastate funding formula.

The Title III formula* is:

Population 60+	30%
Population 60+ in Rural Jurisdictions	10%
Population 60+ in Poverty	50%
Population 60+ Minority in Poverty	10%

* Title III-D, Preventive Health, is further adjusted for medically underserved areas.

A complete description can be found in Virginia's State Plan for Aging Services on the VDA website.

We are reviewing the attached November 3, 2000, V4A recommendation for a phase-in as well as other options.

If you have any questions, please call me at (804) 662-9309.

Cc: Jay W. DeBoer, J.D., Commissioner

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Virginia Association of Area Agencies on Aging

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November 3, 2000

Dr. Ann Y. McGee, Commissioner
Virginia Department for the Aging
1600 Forest Avenue, Suite 102
Richmond, Virginia 23229

Dear Dr. McGee:

New Census data, when applied to the existing formula for the distribution of Older Americans Act Title III funds, may result in radical shifts in funding for aging services in Virginia. Abrupt shifts may leave many clients without services and provider agencies with few tools to mitigate these impacts. During the meeting of the full membership in October, the Virginia Association of Area Agencies on Aging adopted the following recommendation:

We recommend a phase-in of the new Census data in order to allow provider agencies opportunities to seek new sources of support and/or to use attrition to gradually lower service levels as necessary.

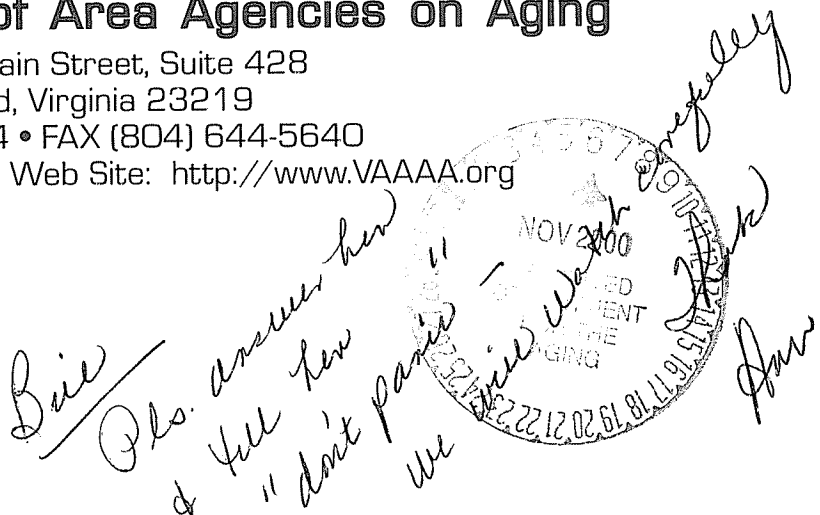
If the new data, when applied to total resources available, will result in a loss of more than five percent in formula funding to any agency for the coming fiscal year, the new data should be phased in for all agencies as follows:

1. For the first fiscal year for which the new Census data is complete and available to be included in planning figures, the allocation of funds should be computed using 67% of the previous data and 33% of the new data.
2. For the second year, the allocation of funds should be computed using 33% of the previous data and 67% of the new data.
3. For the third year, the new data should be used entirely for the distribution of funds.

We would greatly appreciate your consideration of this recommendation in planning for the new Census data. If you would like clarification about this recommendation, Harris or I will be pleased to discuss this with you or any member of the VDA staff. Thank you for your consideration.

Sincerely,

Terri Lynch
President



COMMONWEALTH of VIRGINIA
Department for the Aging
Jay W. DeBoer, J.D., Commissioner

MEMORANDUM

TO: Executive Directors
Area Agencies on Aging

FROM: Carol Cooper Driskill

DATE: February 8, 2005

SUBJECT: JABA Health Services Program

Thanks for Jefferson Area Board for Aging (JABA) for sharing the attached press release. The National Council on Aging identified JABA Health Services Program as one of seven Best Practice Partnerships. They were recognized for their success in forming partnerships with local governments to bring healthy aging programs to older adults in rural communities. JABA Health Services brings health-related screenings, examinations and educational programs to seniors by holding clinics in JABA senior centers.

For more information, please contact Laura Humbertson, Regional Manager of JABA Health Services, at (434) 817-5239.

Jefferson Area Board for Aging

NEWS RELEASE

SUBJECT: **NCOA recognizes JABA's Health Services Program**

FROM: Bea Mook (434-817-5243)

DATE: October 21, 2004

FOR RELEASE ON RECEIPT

The National Council on Aging has identified the JABA Health Services Program as one of seven Best Practice Partnerships in the Nation. It was recognized for its success in forming partnerships with local governments in order to bring healthy aging programs to senior citizens in rural communities, according to the NCOA.

This is not the first award for the program. The Geriatric Assessment Intervention Team program, as it was originally named, was honored in 2002 as a "Models That Made It." Initially, a three-year grant from the Virginia Health Care Foundation (VHCF) funded GAIT, which expanded to become JABA Health Services. The success of the original program was touted as a model that should be implemented in other places.

Now, JABA Health Services receives funding from a number of sources besides VHCF. These include United Way; local governments of the counties of Fluvanna, Greene, Louisa and Albemarle County, and the City of Charlottesville, and the Charlottesville Redevelopment and Housing Authority.

In addition, the University of Virginia Medical Center and the UVa School of Nursing send student nurses to provide help with care of patients with multiple chronic diseases.

The JABA Health Services brings health-related screenings and examinations and educational programs to seniors.

“The clinics are held in JABA senior centers,” said Laura Humbertson, regional manager of JABA health services. “They are especially important in rural settings where low-incomes seniors have limited access to health care providers.”

While staff members are very proud of the strides they have made, they continue to make every effort to improve the health of the senior community, Humbertson added. “In the future, we look to provide services for depression and arthritis.”

For information about JABA Health Services, contact Laura Humbertson at (434) 817-5239 or lhumbertson@jabacares.org.

COMMONWEALTH of VIRGINIA
Department for the Aging
Jay W. DeBoer, J.D., Commissioner

MEMORANDUM

TO: Executive Directors
Area Agencies on Aging

FROM: Janet Dingle Brown, Guardianship Coordinator and Legal Services Developer

DATE: February 8, 2005

SUBJECT: Legal Services Survey

Dear Executive Directors,

I need your assistance. Enclosed is a survey to obtain information about your legal assistance program as mandated under the Older Americans Act. Because I know how I personally react to *yet-another survey-request*, I want to provide some additional information as to why this particular survey is so important to all of us.

Rather than merely crunching numbers or going through the motions – this survey is designed as a strategic instrument to assess strengths and weaknesses, upon which future training and partnerships will be developed. We need this information to determine how we can better serve your agency in meeting Virginia's legal assistance program goals. Based on the information you provide, our goal will be to "tailor" future policies and procedures to ensure successful legal assistance programs throughout Virginia. Given this important task, I am asking that you complete the attached survey as accurately as possible on a priority basis.

Please return the survey to our office, to the attention of Barbara Sheehan, MSW student intern by February 25, 2005. You may return the survey by email (barbara.childers@vda.virginia.gov) or by fax (804) 662-9354. If you have any questions regarding completion of this survey, please feel free to telephone Barbara at (804) 662-9153.

Thank you for your help.

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E-mail: aging@vda.virginia.gov • Web Site: www.vda.virginia.gov

PSA # _____

Please answer the following questions and return to VDA by February 25, 2005.

1. Approximately how much time weekly does your legal assistance staff member spend on legal assistance services?

_____ Less than 1 hr _____ 5 hrs _____ 10 hrs _____ 20 hrs _____ 30+ hrs

2. Approximately how many people contacted your agency for legal assistance in the month of January 2005?

3. Approximately how many of those people were served by your agency and how many of those people were referred out (i.e., legal aid)?

_____ # Your agency served
_____ # Referred to your contractor
_____ # Referred elsewhere (See #4)

4. Of the people you referred elsewhere, what kinds of legal assistance problems did they require help with?

5. Please rate these legal assistance categories 1 through 8 starting with the category that is most often addressed by your legal assistance developer.

_____ Estate Planning (wills, trusts, etc)
_____ Government Benefits (Medicaid, Medicare, etc)
_____ Advanced Planning (Power of Attorneys, Living Wills, etc)
_____ Exploitation/Fraud (Caregiver fraud, phone solicitations, etc)
_____ Family Law (Custody, Elder abuse, etc)
_____ Housing (Shelter, Low-Income, etc)
_____ Social Security Claims/Appeals
_____ Other (See # 6)

6. Are there any other categories of legal assistance provided that are not on the list above?

PSA # _____

7. If you provide legal assistance directly, how do you assess resolution of legal services cases?

8. If you refer out for legal assistance, how does your contractor report case status or resolution to you?

9. How do you assess the level of community need for legal services?

10. What types of legal assistance outreach and community education does your agency have planned for the current Fiscal Year?

11. What is the name and contact information (phone and email) for the person responsible for legal services within your agency?

12. What other programs is this person responsible for within your agency?

13. If you contract out for legal services, what is the name and address of your contractors?

14. Please use the space below for suggestions as to how VDA can strengthen your legal assistance program.

(Check all that apply)

PSA # _____

- _____ Basic Legal Services Training (the law)
- _____ Basic Legal Services Training (the unauthorized practice of law in Virginia)
- _____ Basic Legal Services Training (procedures)
- _____ Joint Presentations to Community Groups and/or Partner Groups
- _____ On-site Visits to local Circuit Court and/or Meeting with Court Clerks
- _____ Legal Services Policies & Procedures Manual
- _____ Legal Services Elder-Law Chart(s) that provide a quick overview of relevant Elder law
- _____ Quarterly Meetings to discuss new laws, trends, case handling, etc.
- _____ Other (*Please describe and/or explain what you would like to see in your agency*)

Thank You!

COMMONWEALTH of VIRGINIA
Department for the Aging
Jay W. DeBoer, J.D., Commissioner

MEMORANDUM

TO: Executive Directors
Area Agencies on Aging

AND: Nutrition Directors

FROM: Carol Cooper Driskill

DATE: February 8, 2005

SUBJECT: 5th Annual Spring Workshop - Congregate Site & Senior Center Staff

This is the fifth year for VDA to sponsor AAA congregate site and senior center staff training in cooperation with Piedmont Geriatric Institute in Burkeville. This year **Group Leadership: How to Effectively Lead Fun & Therapeutic Groups** will be presented. In place of the usual afternoon meeting and activities with me, representatives from Mountain Empire Older Citizens, Valley Program for Aging Services, and Virginia Department for Health, will present **Successful Physical Activity Programs**.

The same program will be repeated on Wednesday, April 13 and Thursday, May 19, 2005. Please find enclosed:

- Flyer
- Information sheet
- Registration form
- Worksheet – return with registration.

The deadline to register for either session is March 30, 2005. Space is limited to 30 people per session. Sessions will be combined or cancelled if the minimum enrollment of 20 per session is not met. The cost is \$20.00 per person and includes instruction, lunch, refreshments, and certificate. Piedmont Geriatric Institute handles registration and payment.

Please contact me with any questions at (804) 662-9319 or Carol.Driskill@vda.virginia.gov. Thank you.

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**5th Annual Spring Workshop for
AAA Congregate Site & Senior Center Staff**



Group Leadership: How to Effectively Lead Fun & Therapeutic Groups

~Plus~

Successful Physical Activity Programs

Attend One:

Wednesday, April 13, 2005 or Thursday, May 19, 2005

10:00 a.m. – 4:30 p.m.

Piedmont Geriatric Hospital, Burkeville

\$20/person includes instruction, lunch, refreshments, & Certificate of Completion

Register directly with Piedmont Geriatric Institute by March 30, 2005

Space is limited. Sessions will be cancelled without minimum enrollment

Group Leadership: How to Effectively Lead Fun & Therapeutic Groups

Congregate site and senior center staff lead formal and informal groups on a regular basis. In this workshop you can learn how to best structure a group to meet your and your clients goals while considering your clients strengths and limitations. The whole group process will be covered from preparation to conducting and closing. The workshop will be interactive.

In preparation for the workshop, a worksheet is filled out for each group/site and returned with registration. The worksheet assesses group composition, gender distribution, and site participant limitations, talents, and special interests.

Successful Physical Activity Programs

An afternoon session will include information about physical activity programs successfully implemented at two AAAs.

For more information, contact Carol Driskill,
Virginia Department for the Aging (804) 662-9319

Sponsored by



5th Annual Spring Workshop for AAA Congregate Site & Senior Center Staff
Group Leadership: How to Effectively Lead Fun & Therapeutic Groups
~Plus~
Successful Physical Activity Programs

Wednesday, April 13, 2005 or Thursday, May 19, 2005 (Attend one)

10:00 a.m. – 4:30 p.m.

Piedmont Geriatric Hospital (Building 29) in Burkeville

Group Leadership: How to Effectively Lead Fun & Therapeutic Groups: Congregate site & senior center staff lead formal & informal groups on a regular basis. In this workshop you can learn how to best structure a group to meet your & your clients goals while considering your clients strengths & limitations. The whole group process will be covered from preparation to conducting & closing. The workshop will be interactive.

Worksheet: In preparation for the workshop, fill out the worksheet & return with registration. The worksheet assesses group composition, gender distribution, & site participant limitations, talents, & special interests. Fill out one worksheet per group/site & return with registration.

Successful Physical Activity Programs: An afternoon session will include information about physical activity programs successfully implemented at two AAA. Dress to move!

Location: Piedmont Geriatric Hospital - Building 29 - Room G5. (434) 767-4521. Near the convergence of Routes 360 & Routes 460 in Burkeville; signs are posted. 18 miles east of Farmville, 100 miles east of Danville, 55 miles west of Richmond, 130 miles west of Norfolk.

Cost: \$20 per person includes instruction, lunch, refreshments, & Certificate of Completion. Non-refundable payment is made directly to Piedmont Geriatric Institute.

Registration Options: Register directly with Piedmont Geriatric Institute

- Mail registration form, worksheets & check to Piedmont Geriatric Institute, P.O. Box 427, Burkeville, VA, 23922-0427 or
- Call registration in to Christy Ballou (Piedmont Geriatric Institute) at 434-767-4521 or
- Fax registration & worksheets to Piedmont Geriatric Institute at 434-767-4947 or
- Email registration information to christy.ballou@pgh.dmhmrzas.virginia.gov

Registration deadline for either session is March 30, 2005. Space is limited (30 per session) so register early. Sessions will be combined or cancelled if the minimum enrollment of 20 per session is not met. If you register & do not receive a confirmation letter 5 days before the workshop, confirm enrollment by calling Christy Ballou at 434-767-4521.

Dress: You will be actively involved in both sessions, so dress casual & comfortable.

Guest Rooms: Comfort Inn, Burkeville. Call the Comfort Inn directly at (434) 767-3750. State rate is accepted. Motel is located at 419 North Agnew Street, Burkeville, at intersection of Route 460 & North Agnew Street. Driving West on Route 460, the hotel is after the hospital. Driving East on Route 460, the hotel is before the hospital.

REGISTRATION FORM

5th Annual Spring Workshop for AAA Congregate Site & Senior Center Staff
Group Leadership: How to Effectively Lead Fun & Therapeutic Groups

Piedmont Geriatric Hospital, Burkeville

10:00 a.m. – 4:30 p.m.

Attend One: Wednesday, April 13, 2005 or Thursday, May 19, 2005

Registration deadline is March 30, 2005

AAA Name _____ Contact Person _____

Address _____ Telephone _____

Name & Title of Attendee Please print clearly Note any needed special accommodations	April 13	May 19	Completed Worksheet Attached

Registration deadline for either session is March 30, 2005. Space is limited (30 per session) so register early! Sessions will be combined or cancelled if the minimum enrollment of 20 per session is not met. If you register & do not receive a confirmation letter 5 days before the workshop, confirm enrollment by calling 434-767-4521.

Send registration directly to Piedmont Geriatric Institute (PGI), P.O. Box 427, Burkeville, VA, 23922-0427 or call your registration into Christy Ballou (PGI) at 434-767-4521 or fax your registration to PGI at 434-767-4947 or email christy.ballou@pgh.dmhmrzas.virginia.gov

Make checks payable to PGI. Cost is \$20.00 per person and is non-refundable.

Worksheet for
Group Leadership: How to Effectively Lead Fun & Therapeutic Groups
April 13 or May 19, 2005 (please circle the date you will attend)

To better meet your needs in the above workshop, please tell us a little about the groups that you are or will be leading. Please fill out one sheet per group/site and return with registration.

1. Give us an estimate of how many males & females are typically in your group: ____ Men ____ Women

2. List some of the special interests & talents you have seen in your group. This could be as diverse as a talent to lead others or gardening or cake decorating or story telling or List as few or many as you can think of:

3. List some of the limitations participants may have that keep them from participating in your current activities:

4. Give us some examples of groups that you're already conducting (just titles are fine as long as they describe the content of your group).

5. List anything else that you think is important in your groups. This can be something that works well, or something you wish you could change.

THANK YOU!

COMMONWEALTH of VIRGINIA
Department for the Aging
Jay W. DeBoer, J.D., Commissioner

MEMORANDUM

TO: Executive Directors Area Agencies on Aging
AAA Transportation Managers

FROM: Faye D. Cates, Human Services Program Coordinator

DATE: February 8, 2005

SUBJECT: **ASSISTED TRANSPORTATION SERVICE STANDARD**

For your review and comment, attached is the *draft* service standard for assisted transportation. We hope to implement this service standard October 1, 2005. The service standard is consistent with the Title III transportation services service standard, except for the following areas: definition, eligible population, and service elements on page 1.

According to my contact with AoA, assisted transportation is a “door-to-door” service, and it is more than an “escort service.” Other than that, AoA wasn’t able to provide much insight related to service delivery. So as you look at the *Service Elements* on page 1, please advise if there are additional elements you would like to incorporate.

Please have your comments back to me by March 1, 2005, and indicate if you would like to be a part of the work group for this service standard. We have already received a response from PSA 2 re. work group participation. Once I have all comments from the network, I will schedule a conference call with the work group. Thank you for the feedback provided.

ASSISTED TRANSPORTATION SERVICES SERVICE STANDARD

VIRGINIA DEPARTMENT FOR THE AGING

Definition

Assisted transportation is the provision of transportation and an escort to older persons who have difficulty using regular vehicular transportation due to physical and/or cognitive limitations. It is a “door-to-door ” service, and the escort can wait with the older person at the doctor’s office or other destinations. Assisted transportation services usually require making reservations in advance. Drivers typically provide assistance for passengers from their front door to the bus and vice versa, when necessary.

Eligible Population

Individuals are eligible for assisted transportation services if they are 60 years of age or older, **and they have physical and/or cognitive limitations.** They lack the ability to transport themselves, and lack other means of transportation. Priority shall be given to older individuals who are in the greatest economic and social need, with preference given to low-income minority individuals and to those older persons residing in rural or geographically isolated areas.²

Service Delivery Elements

Area Agencies providing assisted transportation service either directly, through contract or a combination of means must satisfy the following:

Assessment:

Assessment should determine at least the following, utilizing the Virginia Service - Quick Form:

- Individual is at least age 60.
- Individual cannot drive and lacks other modes of transport by self, community support group or public transportation.
- Whether the individual has significant economic or social need.
- Whether individual requires any special assistance.
- Reassessment determining the client’s level of need for the service shall the service shall be done at least annually.

Federal Poverty/VDA Sliding Fee Scale is required, unless all information needed to determine federal poverty is documented on the Virginia Service - Quick Form.

Service Elements:

“Door-to-door” driver/escort services includes:

² Older Americans Act of 1965, Section 306(a)(4)(A)(i)

- **Meeting the older person at their door or location;**
- **Escorting the older person to the vehicle;**
- **Securing the wheelchair, if applicable;**
- **Escorting the older person into their destination;**
- **Waiting with the older person while services are provided;**
- **Escorting the older persons to their door upon returning home**

Safety Policies:

Written policies must be adopted by the governing board and include at least the following:

- All passengers must wear safety belts and when, where available and practical.
- Each vehicle must be equipped with a fire extinguisher, first aid kit, and emergency signaling devices.
- Inspection procedures for safety equipment, including the method and frequency of inspection.

Administrative Elements

Driver Testing:

- The Area Agency or its provider must adopt and implement a behind-the-wheel driving test to be administered to each potential driver prior to transporting passengers.

Driver Record Check:

- The Area Agency or its provider must adopt a written policy regarding a minimum acceptable driving record for all drivers who transport passengers.
- At hiring and at least annually thereafter, drivers must provide the Agency with a copy of their driving records from the Virginia Department of Motor Vehicles.
- VDA strongly recommends that the AAA adopt a policy for driver alcohol and drug testing.
- At hiring the Area Agency and its providers must complete drug and alcohol testing of drivers. Drug and alcohol testing of drivers shall be conducted when the driver is involved in an accident, if indicated.

Records:

The following records, at a minimum, must be maintained either by the Area Agency or its provider(s), with access permitted in accordance with VDA contract requirements:

1. For each vehicle:
 - Vehicle maintenance/repair history
 - Pre-trip checklists
 - Vehicle logs (mileage, passengers, etc.)
 - A certificate of insurance showing the vehicle identification number (VIN)
 - Vehicle accident records

- Service plans
 - Safety inspection logs
2. For each driver:
- Behind-the-wheel testing results
 - Annual DMV record checks
 - Drug and Alcohol testing upon hiring.

Job Descriptions:

For each paid and volunteer position funded by Title III of the Older Americans Act, an Area Agency on aging or provider shall maintain:

- A current and complete job description of the duties, responsibilities of each transportation services staff position; and
- A current description of the minimum entry-level standards of each job.³

Maintenance:

- The Area Agency or its provider must perform preventive maintenance procedures, including daily pre-trip vehicle inspections and an appropriate plan for regularly scheduled maintenance of vehicles.
- Written documentation of maintenance and repairs performed on each vehicle must be maintained.
- Maintenance standards must meet or exceed the manufacturer's recommendation for the vehicle, or those standards of the Virginia Department of transportation, whichever may be applicable.

Insurance:

- Appropriate fleet liability insurance or, when utilizing volunteers, ensuring possession of adequate personal liability coverage.
- The Area Agency must possess a governing board-approved policy that addresses the issue of volunteer liability, including situations of volunteers driving personal as well as agency vehicles.

Vehicle Accidents:

- The Area Agency or its provider must develop and implement written procedures for drivers to respond to and report accidents.
- Procedures must include instructions for accidents without injuries and with injuries; accidents involving one or more other vehicles; single vehicle accidents; preparing written accident report; and post-accident testing.

³ 22VAC5-20-250, Grants to Area Agencies on Aging, Department for the Aging Regulations, Virginia Administrative Code

Units of Service:

Units of service must be reported in AIM for each client receiving services. Services units can be reported by client on a daily basis, but not aggregated (summarized) more than beyond one calendar month. Units of service for required VDA reports are as follows:

- Unit 1: Total number of one-way trips Y-T-D: carrying one eligible passenger from one location to another for an eligible purpose.
- Unit 2: Total number of unduplicated persons served Y-T-D: the client who receives at least one (1) one-way trip for an eligible purpose.

Program Reports:

- Aging Monthly Report (AMR) to VDA by the twelfth (12th) of the following month. If the Area Agency on Aging provides this service, this report must be updated and submitted even if no expenditures or units of service occurred.
- AIM client level data transmitted to VDA by the last day of the following month.

Consumer Contributions/Program Income

The Area Agency on Aging shall formally adopt written policies and procedures, approved by the governing board, regarding the collection, disposition, and accounting for program income.⁴

- Cost Sharing/Fee for Service: An Area Agency on Aging is permitted to implement cost sharing/fee for service for recipients of this service.⁵
and/or
- Voluntary Contributions: Voluntary contributions shall be allowed and may be solicited
- provided that the method of solicitation is non-coercive.⁶

Quality Assurance

Service Personnel: All drivers must meet the following requirements:

- Prior to employment, pass an Area Agency-approved behind-the-wheel driving test and wheelchair securement training.
- Maintain appropriate operator's license.
- Satisfy an annual Division of Motor Vehicles (DMV) driving record check.
- Have no physical or health limitations that interfere with the safe performance of the driver's assigned duties.
- Be sensitive to the needs and concerns of older persons.

Staff Training

All new drivers must receive the following training within the first year of employment:

⁴ 22VAC 5-20-410, Grants to Area Agencies on Aging, Department for the Aging Regulations, Virginia Administrative Code

⁵ Older Americans Act of 1965, as amended, Section 315(a)

⁶ Older Americans Act of 1965, as amended, Section 315(b)

- Passenger assistance training, including assistance to developmental, physical or sensory disabilities.
- Orientation to the safe operation of the vehicle(s) in service.
- Daily vehicle inspections and record-keeping.
- Emergency procedures for responding to and reporting vehicle accidents, passenger injuries and equipment breakdowns.
- Defensive driving course and a behind-the-wheel examination.

Current drivers must complete annual refresher courses of at least one hour each in passenger assistance, emergency procedures and defensive driving.

Supervision/ Case Review:

Consultation, supervision and case review shall be available to all staff providing the service.

Program Evaluation:

The agency should conduct regular systematic analysis of the persons served and the impact of the service. Subcontractors shall be monitored annually.

Client Records:

Service providers must maintain specific program records that include:

- Virginia Service - Quick Form (At a minimum, this form must be updated annually).
- Federal Poverty should be determined and documented. The Federal Poverty/VDA form may be used.
- Any Fee for service charge to the client shall be determined by the applicable sliding fee scale.